



Thrift Savings Plan BULLETIN

for Service TSP Representatives

Subject: Revision of Form TSP-U-50, Investment Allocation

Date: August 6, 2002

The Federal Retirement Thrift Investment Board (Board) has revised [Form TSP-U-50, Investment Allocation](#), for use in the new record keeping system. An advance copy of this form, dated August 2002, is attached to this bulletin.

Purpose of Form TSP-U-50. Participants may use Form TSP-U-50 to request contribution allocations and/or interfund transfers for their uniformed services Thrift Savings Plan (TSP) account.¹ However, **participants are encouraged to use the more efficient electronic media** (i.e., the Web site at www.tsp.gov or the ThriftLine at (504) 255-8777) to request these investment changes.

Obtaining Form TSP-U-50. Participants may obtain Form TSP-U-50 from their service or from the TSP Service Office (at the ThriftLine number above).² Form TSP-U-50 is **not** available from the TSP Web site (unlike all other TSP forms).

The Board will send each service central distribution point a supply of the August 2002 revision of Form TSP-U-50. By September 2, 2002, each central distribution point should receive an amount equal to approximately 10% of its enrolled population. The central distribution points should then distribute these forms appropriately to the offices in the

(continued on next page)

¹ Participants request contribution allocations to direct the investment of future deposits (e.g., contributions and loan payments) to their TSP account. Participants request interfund transfers to change the investment of their existing TSP account balance. A contribution allocation does not affect the investment of the participant's existing account balance; an interfund transfer does not affect the investment of future deposits made to the participant's account. See the *Summary of the Thrift Savings Plan for the Uniformed Services* or the *Guide to TSP Investments* for more information about these investment requests.

² Although a service representative should provide Form TSP-U-50 to a participant upon request, the representative should also inform the participant that contribution allocations or interfund transfers may be requested more efficiently by using the TSP Web site or ThriftLine.

Inquiries: Questions concerning this bulletin should be directed to the Federal Retirement Thrift Investment Board at **(202) 942-1460**.

Chapter: This bulletin may be filed in Chapter 6, Investments.

Supersedes: This bulletin supersedes TSP Bulletin 01-U-10, Thrift Savings Plan Investment Allocation, Form TSP-U-50, dated October 29, 2001.

service which are responsible for providing the form to participants. Services may obtain additional supplies of the form by having a representative from the central distribution point order them from the TSP.

A handwritten signature in black ink, reading "Pamela-Jeanne Moran". The signature is written in a cursive, flowing style.

PAMELA-JEANNE MORAN
Deputy Director
Office of External Affairs

Attachment: Form TSP-U-50, Investment Allocation



Use this form to allocate your investments among the five TSP funds. You can do this in two ways: You can direct the way your **future contributions** (as well as loan payments and transfers from other plans) will be invested, and you can also make an **interfund transfer** to change the distribution of the balance that is already in your account. **Before completing this form, read the information on the back.**

This form is designed to be read by an optical scanner. Carefully type or print information within the green boxes. Use black or dark blue ink. If you hand print, try to make your numbers look like these:

0	1	2	3	4	5	6	7	8	9
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Make a copy of this form for your records. Mail the completed form to: **TSP Service Office, National Finance Center, P. O. Box 60012, New Orleans, LA 70160-0012.** Do **not** fax this form.

You will be sent a confirmation of your request after it is processed. **DO NOT submit this form to your service. Your service cannot process it.**

I. INFORMATION ABOUT YOU

Name _____

Last First Middle

Social Security Number - -

Date of Birth - -

Month Day Year

II. YOUR INVESTMENT ALLOCATION

To allocate your **future contributions**, complete Column 1 by entering the percentages you want invested in each fund. (If you have a TSP loan, your loan payments will also be invested according to your allocation in Column 1; the same is true for transfers from other plans.) To request an **interfund transfer**, complete Column 2, entering the percentages you want to have in each fund after the transfer. To allocate your future contributions **and** request an interfund transfer, complete both columns.

Indicate your investment allocation, in whole percentages. Do not use dollar amounts. If you do not want to invest in a fund, leave the box blank. The total of the percentages you enter in each column must equal 100%.

Note: If you have a civilian TSP account, this form will **not** close that account.

G Fund (Government Securities Investment Fund)

F Fund (Fixed Income Index Investment Fund)

C Fund (Common Stock Index Investment Fund)

S Fund (Small Capitalization Stock Index Investment Fund)

I Fund (International Stock Index Investment Fund)

1
Allocate future
contributions

2
Request an
interfund transfer

■ ■ ■ .0%

■ ■ ■ .0%

0.0%

■ ■ ■ .0%

■ ■ ■ .0%

0%

0.0%

0%

■ ■ ■ .0%

■ ■ ■ .0%

Total	1	0	0	.0%	1	0	0	.0%
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III. SIGNATURE

You must sign and date this form; otherwise, your request will not be processed. If you invest in the F, C, S, or I Fund, you are acknowledging the risk of investing in those funds by signing this form.

Acknowledgement of Risk — I understand that if I invest in the F, C, S, or I Fund, I am making this investment at my own risk. I also understand that I am not protected by either the U.S. Government or the Federal Retirement Thrift Investment Board against investment loss in the F, C, S, or I Fund, and that neither the U.S. Government nor the Federal Retirement Thrift Investment Board guarantees a return on my investment.

Participant's Signature _____

Date - -

Month Day Year

(_____) _____ – _____
Telephone (Area Code and Number) (**not** DSN)

Check one: ☐ Office ☐ Residence

Mailing Address

GENERAL INFORMATION

You may make your investment allocation request in any of three ways:

- **TSP Web Site — www.tsp.gov (Account Access section).** If you have Internet access and your browser supports 128-bit encryption, you can make your request in the secure area of the TSP Web site. You will need your Social Security number (SSN) and your TSP Personal Identification Number (PIN). Your request is recorded immediately, avoiding the mailing and processing time of a paper request. **Note:** Do not confuse your TSP PIN with a PIN that your service assigned to you to use with its pay system.
- **TSP ThriftLine — (504) 255-8777.** You must call from a touch-tone telephone. You will need your SSN and TSP PIN. Your request is recorded immediately, avoiding the mailing and processing time of a paper request.

Requests made on the Web site or ThriftLine by 11:00 a.m., central time, on any business day, will ordinarily be processed that day. Requests made after 11:00 a.m., central time, will ordinarily be processed the next business day.

- **Form TSP-U-50.** Complete, sign, and date the front of this form and mail it to the TSP Service Office. Your request will ordinarily be processed as described above, based upon when it is entered into the TSP system. Forms TSP-U-50 are ordinarily entered within 24 hours of receipt. Do not submit this form to your service. Your service cannot process contribution allocations or interfund transfers.

INVESTMENT CONSIDERATIONS

Your TSP account is invested for your retirement, and you should make your investment decisions with this long-term goal in mind. Review the information available about the TSP funds so that you understand the risks involved and the possible effects of your decision on your TSP account.

Read the *Summary of the Thrift Savings Plan for the Uniformed Services*, which describes each of the funds in detail. The Plan Summary is available from your service or, if you have left Government service, from the TSP Service Office. It is also available on the TSP Web site. Recent historical rates of return for the TSP funds and related indexes are available on the TSP Web site and in the *TSP Highlights* that accompanies your participant statement. More detailed fund information may also be found in the *Guide to TSP Investments*, available from your service or the TSP Web site.

INSTRUCTIONS FOR FORM TSP-U-50

This form is designed to be read by an optical scanner. Carefully type or print your information within the green boxes. Use black or dark blue ink. Try to make your numbers look like the sample numbers on the front of the form.

I. Information About You

Social Security Number. Enter a number in each box. Do not fill in the hyphens. They are already provided.

Date of Birth. Enter the month and day. **Do not** use leading zeros on single-digit months and days. Enter the last 2 digits of the year.

PRIVACY ACT NOTICE. We are authorized to request this information under 5 U.S.C. chapter 84. Executive Order 9397 authorizes us to ask for your Social Security number, which will be used to identify your account. We will use the information you provide on this form to process your investment allocation request. This information may be shared with other Federal agencies or the uniformed services for statistical, auditing, or archiving purposes. In addition, we may share the information with law enforcement agencies investigating a violation of civil, criminal,

For example, for the date February 4, 1953, you would write:

2 - 4 - 1 9 5 3

II. Your Investment Allocation

You can use this form to allocate the way your contributions are invested each pay period, or to request that the money already in your account be redistributed among the funds, or both.

Allocate Future Contributions. If you are using this form to specify the way your future contributions should be invested, complete **Column 1**. Your allocation will affect **all** subsequent contributions (as well as loan payments and transfers from other plans to your TSP account) until you change it.

Note: If you are newly enrolled in the TSP and you are making your first contribution allocation for your TSP account, do not submit this form until you have received your New Account Letter, which confirms that your account has been established.

Make an Interfund Transfer. If you are using this form to change the way your current account balance is invested in the TSP funds, complete **Column 2**. Each interfund transfer is a one-time transaction and affects your entire account balance as of the effective date of the transfer.

Enter the percentage you would like to invest in each fund. If you do not want to invest in a fund, leave the boxes for that fund blank.

Do not use leading zeros or numbers less than 100. For example,

5% would look like this: 5 .0%

20% would look like this: 2 0 .0%

The total of the percentages in each column must equal 100%.

III. Signature

You must sign and date this form. By signing this form, you are acknowledging the risk of investing in the F, C, S, and I Funds.

Do not use leading zeros in the date. Do not allow any portion of your signature to enter the date boxes to the right of the signature line. Provide your daytime telephone number (**not** DSN) and mailing address so that the TSP Service Office will be able to contact you if there is a question about your request.

CONFIRMATION OF THE ALLOCATION OR TRANSFER

A confirmation notice will be mailed to you at the address in your TSP account record. In addition, you can review the result of your contribution allocation or interfund transfer by accessing the TSP Web site or by calling the ThriftLine after your request has been processed.

Note: If your address is not correct on your most recent participant statement, contact your service immediately to have it corrected. If you have left the uniformed services, you can change your address on the TSP Web site, by submitting Form TSP-U-9, Change of Address for Separated Participant, or by calling the TSP Service Office.

or military law, or agencies implementing a statute, rule, or order. It may be shared with congressional offices, private sector audit firms, spouses, former spouses, and beneficiaries, and their attorneys. We may also disclose relevant portions of the information to appropriate parties engaged in litigation. You are not required by law to provide this information, but if you do not provide it, we will not be able to process investment allocation request.